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FinancialPlanning

Wealthtech Weekly

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By Rob Burgess
Reporter

"There's an opportunity here to replace human advisors with AI." That's how Range CEO Fahad Hassan is positioning his tech business — but actual advisors aren't convinced. Many in wealth management see AI as a tool to enhance, not replace, the human touch.

Conversations about how advisors can tap the rapidly advancing technology in ways that allow them to deliver best-in-class guidance to clients will take center stage next week.

I'm looking forward to ADVISE AI at the Wynn Las Vegas. At 11:40 a.m. PST Wednesday, Oct. 29, I'll be moderating, "AI at Every Touchpoint: Transforming the Client Meeting Lifecycle," featuring Michael Brady of Generosity Wealth Management, Stephen Chien of LPL Financial and Larry Sprung of Mitlin Financial. I've also spoken to several fellow speakers about what they'll be presenting.

Will you be there? Let me know — robert.burgess@arizent.com.

I hope you'll check out these articles, along with the rest of this week's stories.

As always, thank you for reading. Talk to you next Thursday!

Connect with Rob:

WEB SEMINAR

Serving the whole client: Why holistic wealth management is the future of advice

Hosted by Financial Planning

Partner Insights from Vanilla

November 11, 2025 | 2 p.m. ET/11 a.m. PT

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TOP STORIES

TECHNOLOGY

Don't think AI will replace you? That's this CEO's goal

As Financial Planning's AI Readiness Survey showed, most advisors aren't concerned about their own jobs. But others aren't so sure.

- **Looking at outside tools for held-away asset management: Show Me Your Stack**
  Drew Lunt, founder of Scratch Capital in Boise, Idaho, still uses Black Diamond for his portfolio accounting needs, but as his client base expands to more affluent, complicated clients, he has looked outside the industry for solutions.
- **Built-in AI isn't always easy to turn off — here's why that matters**
  New AI tools are often added to existing tech without fanfare, meaning that advisors who don't want to use them are forced to scour for ways to turn them off.
- **As gold smashes records, more advisors adjust allocations**
  As geopolitical and other uncertainty remains, gold is seen as a useful hedge. But experts warn gold's rise won't last forever.
- **ETF inflows top $500B in first half of 2025 as advisors fuel boom**
  Advisors cited better liquidity, lower expenses and higher tax efficiency as among the reasons they like ETFs, the market for which has topped $11 trillion.

Read the latest in Wealthtech

PARTNER INSIGHTS FROM EQUITABLE ADVISORS

Maintaining firm autonomy when sharing technology, people and processes

In this Q&A article with David Karr, chairman of Equitable Advisors, gain perspective on how financial advisors can leverage shared resources and lean into AI to more efficiently.

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